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India's Grain Crisis

U.K. Grain Output To Expand Under EC

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This week's cover:

Junks and sampans in the Hong Kong harbor unload U.S. products. With increased prosperity and limited agricultural potential, Hong Kong is a large and expanding market for U.S. farm products, particularly consumer-ready items. For article on the growing potential of these products, see page 6.

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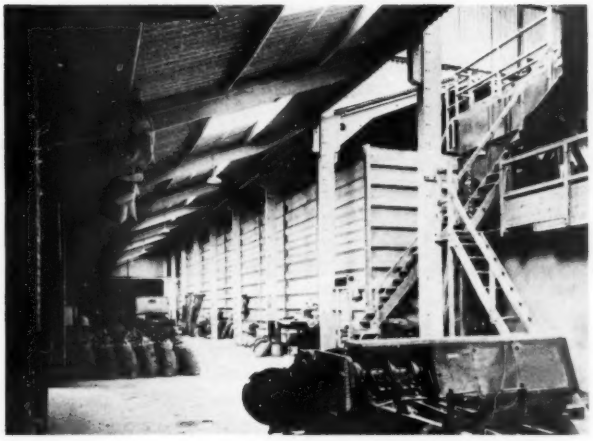
Above, two types of grain storage used in the United Kingdom: Floor storage of grain and storage in ventilated silos using warm-air drying.

Left, harvesting progresses in the grain area of Britain's East Anglia. Below, a grain storage warehouse at Southchurch, Essex.



BRITISH GRAIN OUTPUT EXPECTED TO EXPAND WITH EC MEMBERSHIP

By MARSHALL H. COHEN
Foreign Demand and Competition Division
Economic Research Service

The United Kingdom, now one of the world's leading grain importers, may move toward a position of grain self-sufficiency after it joins the European Community (EC). This is the conclusion of several recent studies on the United Kingdom and the EC, which see U.K. grain production and consumption possibly following trends evident in the EC—that is, rising grain production in response to high prices but declining consumption as livestock producers substitute cheaper nongrain feeds for grains.

There has been considerable research concerning U.K. grain production, particularly the size and composition of future crops. This focus on grain reflects the United Kingdom's role as the largest West European grain importer, taking about 20 percent of the area's grain imports in 1970, valued at $675 million. (Grain accounts for about 25 percent of all U.S. agricultural exports to the United Kingdom.)

At the same time, the country ranks as one of Western Europe's largest grain producers—and the largest outside of the EC.

With accession to the EC in January, the United Kingdom will gradually inherit grain prices far above world levels, while adopting a system of variable levies largely insulating the British grain farmer from fluctuations in world prices. These factors have led to projections of a sharp expansion in grain output in the United Kingdom.

One of the first studies exploring the effects of EC expansion, published by Michigan State University[1] (See *Foreign Agriculture*, Feb. 28, 1972) projected that accession to the EC would boost total U.K. grain output as high as 23 million tons by 1980, compared with a base-year 1968 production of 13 million. At the 1980 level of output, the United Kingdom would be self-sufficient on a net basis in grains. The study did add, however, that increases in grain acreage might be restrained by rotation factors affecting yields: continuous cropping may increase the possibility of disease infestation, weeds, and other negative developments.

Another alternative seen by the authors of both the Michigan State study and a later report by the London Trade Policy Research Center[2] is a shift from dairying to higher beef output. Since the expanded EC will continue to be a beef-deficit region, higher profitability could be associated with livestock production rather than grains (and also lead to greater utilization of oilcake and meal and high-protein nongrain feeds). The Trade Policy Research Center report concluded that the emphasis on beef production could be reflected in an expansion of grassland and more feeding of hay and silage. A shift from dairying to beef production would release land resources to accommodate the expanded beef industry.

The U.K. Government, through increased subsidization, has already begun encouraging expansion of beef cow numbers, and further efforts are expected. In the EC, however, high grain prices have thus far served as a deterrent to beef industry expansion.

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[1] *The Impact on U.S. Agricultural Trade of the Accession of the United Kingdom, Ireland, Denmark, and Norway to the European Economic Community*. Michigan State University, Institute of International Agriculture, Res. Report No. 11, 1971.

[2] *Burdens and Benefits of Farm-Support Policies*, Trade Policy Research Center Agricultural Trade Paper No. 1, London, England, 1972.

On the consumption side, most studies concur that grain use will be curtailed by the high prices.

A recent report by the Economic Research Service [3] predicts that the significantly increased prices of grain resulting from U.K. entry into the EC will sharply reduce use of grains in compound feeds. Although total output of compound feeds is projected to rise, grain's share of the mixture is forecast to decline from over 70 percent in 1968 to 37 percent in 1980, with EC membership.

A STUDY BY THE University of Newcastle-Upon-Tyne [4] sees a sharp rise in production and use of mixed feed, but with a dramatic replacement of grain by grain substitutes in the composition of the mix (particularly in mixed feed for cattle). The study assumes that the overall price of grains to U.K. feed manufacturers will increase by 80 percent between 1969-70 and 1977-78, while prices of grain substitutes will rise by only 40 percent, and the increase for high-protein feeds will be only 30 percent. These price disparities are expected to reduce grain's share of the total livestock feed mix from 73 percent in 1969-70 to 49 percent by 1977-78, reversing a trend of rising consumption in the late 1960's. The absolute decline over the period in quantity of feedgrains consumed amounts to about 3.2 million to 3.7 million tons.

Typical of what might happen to U.K. grain consumption are developments now occurring in the EC. The rate of increase in EC feed use of grain has slowed in the last few years, despite continued rapid growth in mixed feed output. And in the Netherlands, where substitution of nongrain feeds has been faster than for the EC as a whole, the percentage of grain in mixed feeds declined from 66 percent in 1959-62 to 34 percent in 1970-71.

Factors that will determine whether nongrain ingredients become more important to the United Kingdom include:

- The extent to which feed needed for an expansion in the cattle herd will be met by more intensive use of grassland;
- Modification of future grain price levels in the EC;
- Other developments affecting price relationships between grains and nongrain feeds.

After accession, British grain producers will be governed by the EC's Common Agricultural Policy (CAP) in grains, with its four main areas of support for producers—intervention buying, denaturing subsidies for feeding wheat, import levies, and export subsidies.

The intervention apparatus will begin operation in the United Kingdom on February 1, 1973, although to prevent price problems the traditional British deficiency payments system will continue for a limited time after intervention prices become available. This will afford some additional protection to British growers since farmers were apprehensive that the EC intervention prices initially scheduled to be applied were not high enough. As in the EC, intervention prices will vary according to area of production.

The principal intervention centers for grain in western United Kingdom will be at Belfast, Glasgow, Liverpool, and Avonmouth. Since these are areas of greatest deficit, the higher Duisberg (West Germany) wheat and barley intervention prices will be applied after the transition period ends on January 1, 1978. (In the continental EC, Duisberg is designated the greatest deficit area.)

In the United Kingdom's large grain-producing area, the eastern region, the intervention center is Tilbury, also the largest importing port. There, the lower Rotterdam wheat price provides the basis for intervention. In the small east coast towns of Aberdeen, Leith, Newcastle, Hull, and Kings Lynn, and in Southampton, the Antwerp price applies for wheat. A price slightly above the Rouen price applies for barley.

British grain farmers will also be eligible to receive subsidies for diverting wheat into feeds via denaturing subsidies. ("Denaturing" is a process of treating grain with additives rendering it unfit for human consumption.) This subsidy could be particularly important in the United Kingdom, where 3 million to 4 million tons of wheat have been used for feed annually in recent years—roughly one-third of total domestic wheat disappearance.

A recent development has been a tendency to increase the quantity of wheat fed to livestock on farms of origin, reflecting a policy change in 1971-72 under which deficiency payments for wheat were paid on an acreage basis rather than a sales basis, as in the past. Finally, as members of the EC, the farmers would be eligible to receive subsidies on exports of grain. (For more information on the implementation of the EC grain CAP, see the special EC issue of *Foreign Agriculture*, Oct. 2, 1972.)

These EC incentives to U.K. grain production will continue to encourage past trends of rising production.

The United Kingdom has promoted higher production of domestic grain since World War II, when the national emergency resulted in a strong motivation to increase self-sufficiency in grains. Acreage expanded sharply, with the diversion of pastureland to grain a significant factor behind the expansion.

Agricultural policy since that time has emphasized increased domestic output, but in recent years the motives have been economic ones arising from severe economic crises and balance of payments deficits. Policy has thus been geared toward expanding output of products such as grain in an effort to cut back on imports. The principal tool to achieve this goal has been the system of price guarantees, under which farmers have received increasingly higher market prices.

IN RECENT YEARS, guaranteed prices for grains have been boosted annually. The increase for the 1972-73 crop year amounted to over 5 percent for wheat ($2.16 per bu.) and 7 percent for barley ($1.57 per bu.).

These higher prices have led to rapid expansion in U.K. grain output, particularly barley—the principal domestically produced grain. In the United Kingdom, barley has the advantage over wheat in that high yields are achieved more uniformly throughout the country; wheat, on the other hand, achieves its best results in the southeastern region, the prime grain area.

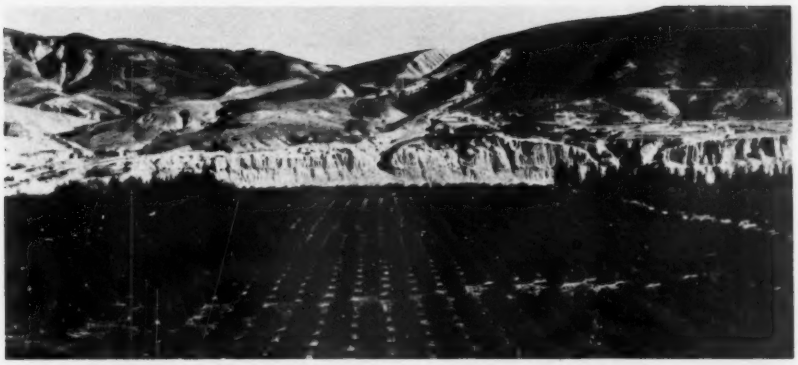
For 1972, U.K. barley production is preliminarily estimated at 9.5 million tons—about 85 percent of its total feedgrain production and a new record. This was produced from 5.7 million

(Continued on page 20)

[3] Horst, James, *Compound Feeds in the United Kingdom, Effects of Support Policies on Use of Ingredients.* USDA, ERS-Foreign 324, Feb. 1972.

[4] Sturgess, I. M. and Reeves, R., *The Potential Market for British Cereals*, Univ. of Newcastle-Upon-Tyne, May 1972.

Morocco Expects Record-Breaking Citrus Crop



Favorable weather and more producing fruit trees bode well for Morocco's citrus harvest, projected to top last year's record crop by 4 percent. Marketing prospects are less bright, however, with intense competition expected from Spain and other large Mediterranean citrus producers.

Moroccan citrus production in 1972-73 is forecast to reach an unprecedented 878,250 metric tons of average or above average-quality fruit, up from last season's 843,750 tons. Although cool weather has delayed ripening somewhat, the crop should reach the market about 4 weeks earlier than last season's harvest, which was slowed by weather conditions.

Exports of citrus in the 1972-73 season are expected to total 618,000 tons, up slightly from 1971-72 exports of 607,000 tons. Last season's export receipts declined 4 percent, from $100.8 million in 1970-71 to $96.4 million, in spite of a 5-percent increase in volume. Although marketing early in the season was satisfactory, exports of later varieties met strong competition.

Morocco's chief markets remain France, West Germany, and the USSR. Moroccan Government schemes to promote oranges, using samples and posters, are currently underway in principal West European markets and efforts are being made to find new markets in Eastern Europe.

Surveys of Morocco's producing areas show some 163,000 acres under citrus, with long-range industry plans calling for an increase to 210,000 acres by 1978, and production of near 1.8 million tons by 1985. Under the 1985 production goals, the most expansion would occur in the early varieties—clementines and navels—as well as late valencias.

Meeting these Government development priorities, however, will depend largely on future marketing potentials and changes.

In 1971-72, average prices received by Moroccan growers for exportable fruit increased for clementines, navels, and other early varieties, but declined sharply for valencias. Grower prices for domestic fresh citrus averaged about $30 per metric ton, and prices for fruit for processing ranged from $15 per ton for early and mid-season varieties to $30 for late varieties. In 1972, advance payments to growers for new-crop citrus were $77 per ton for clementines, $33 per ton for navels and Washington sanguines, and $44 per ton for valencias (Maroc Late). (DH 4.56=$US1).

An estimated 110,000 tons of fruit, principally oranges, is believed to have been processed in 1971-72, resulting in 5,000 tons of concentrate (mostly hot pack, rather than frozen) and 4.6 million gallons of single strength juice. Of last season's production, an estimated 369,800 gallons of single strength and 200 tons of concentrated juice was used locally, and the rest exported.

Under the long-range citrus plan, up to 350,000 tons of fresh fruit should be available for processing in 1985, a volume requiring substantial production planning and marketing efforts. The capacity of the local processing industry—nine plants, including a new plant with a prospective annual capacity of 60,000 tons—could easily be expanded to accommodate larger quantities. However, assurance of consistent fruit availability will be necessary, rather than the fluctuating residual supplies of unexportable fruit, as in recent years.

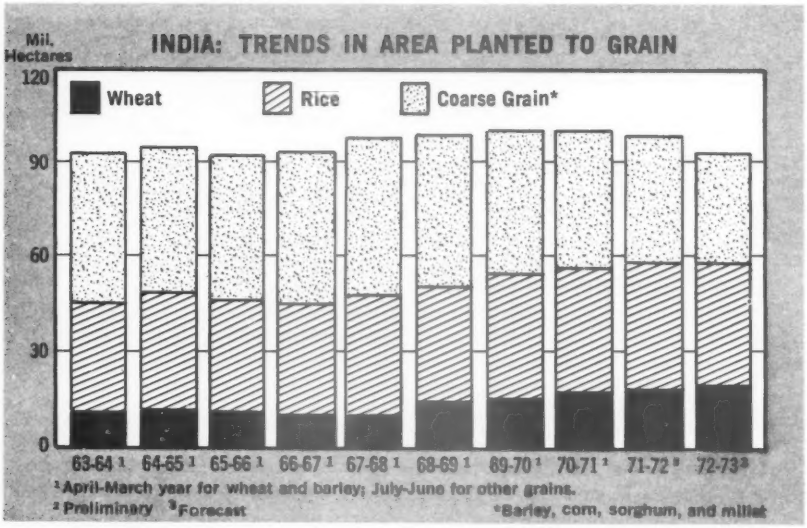
Morocco recently established an agency to administer the distribution of fruit between fresh markets and processing industries—a necessity if plants are to operate at optimum efficiency and juice markets are to be developed and maintained.

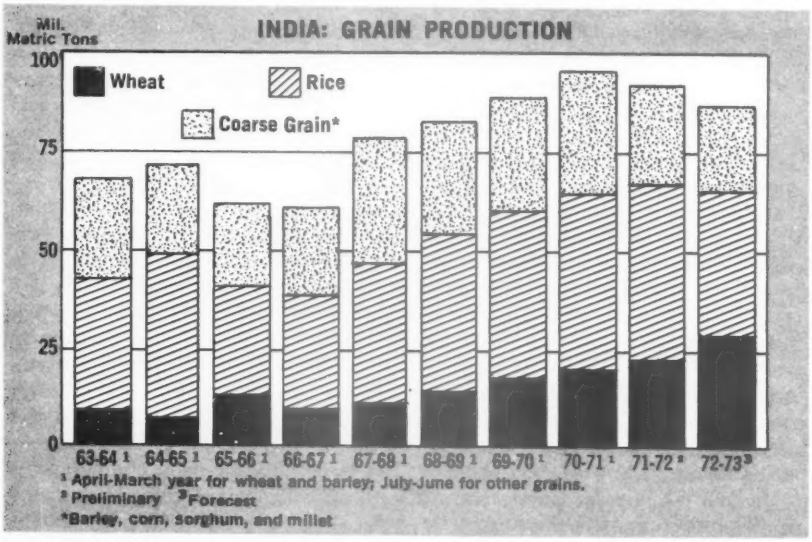
—Based on a report by
DUDLEY G. WILLIAMS
Agricultural Attaché, Rabat

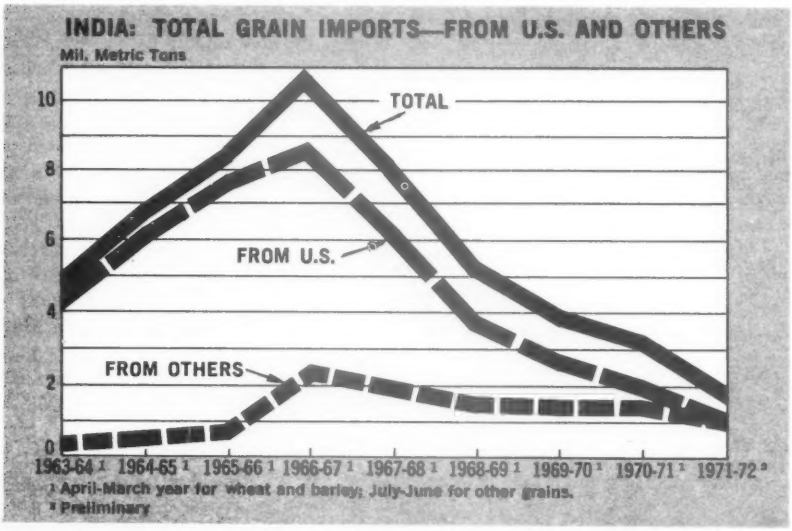
MOROCCO'S CITRUS PRODUCTION AND ACREAGE ESTIMATES BY VARIETY

Variety	1971-72 Production	1972-73 Production [1]	1972-73 Area [2]	1985 Production [3]
	Metric tons	*Metric tons*	*Acres*	*Metric tons*
Sanguines	102,844	98,000	19,768	135,000
Navels	156,153	182,600	27,922	460,000
Fines	59,252	52,350	5,930	—
Valencia (Maroc Late)	341,645	325,000	49,420	600,000
Varinias	9,580	13,800	2,471	—
Clementines	111,829	124,900	38,300	370,000
Mandarines	39,447	57,100	15,320	—
Salustiana	—	500	741	135,000
Grapefruit	15,000	18,000	1,483	30,000
Lemons	8,000	6,000	1,730	40,000
Total	843,750	878,250	163,086	1,770,000

[1] Estimated. [2] Forecast. [3] Goals.
Association of Moroccan Producers and Office of Commercialization and Exportation.


Mil. Hectares
INDIA: TRENDS IN AREA PLANTED TO GRAIN
Wheat
Rice
Coarse Grain*
120
90
60
30
0
63-64 1 64-65 1 65-66 1 66-67 1 67-68 1 68-69 1 69-70 1 70-71 1 71-72 2 72-73 3
1 April-March year for wheat and barley; July-June for other grains.
2 Preliminary 3 Forecast
*Barley, corn, sorghum, and millet





Indian Grain Crisis Forces Expansion in The Country's Import Needs

By KENNETH L. MURRAY
and EMANUEL McNEIL
Grain and Feed Division
Foreign Agricultural Service

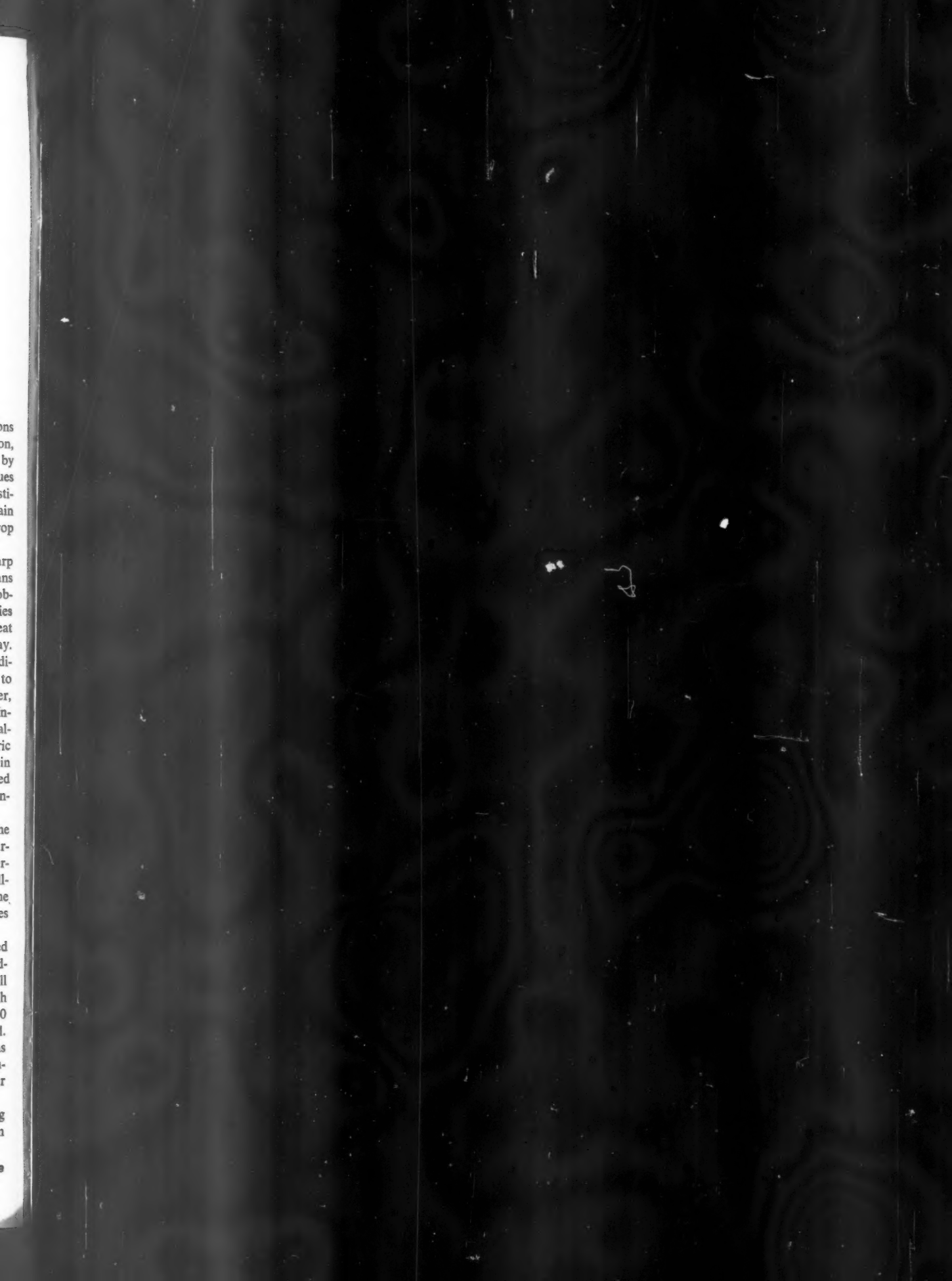
After 5 years of favorable monsoons and steadily rising food production, India this year was hit once again by the drought that periodically plagues its agriculture. The result was an estimated 7-million-ton drop in 1972 grain production for India's smallest crop since 1968.

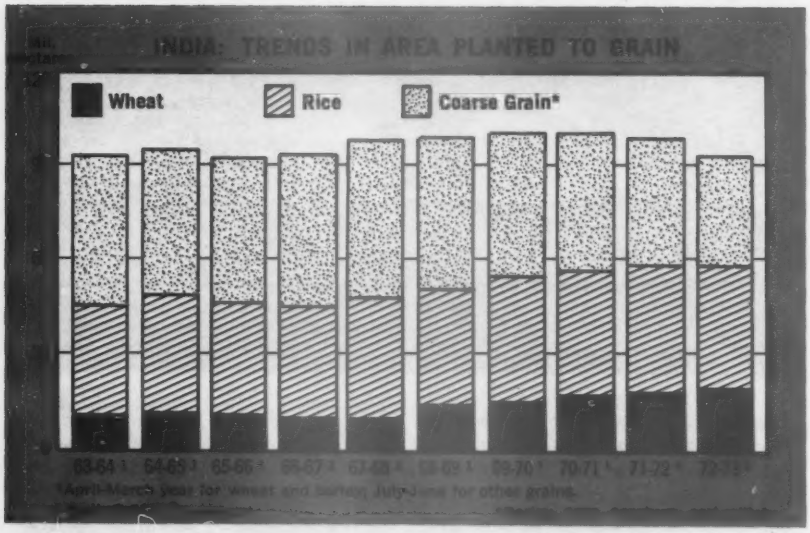
This decline, coupled with a sharp drawdown in Government stocks, means that India is now faced with the problem of filling a gap in grain supplies before next year's spring crop of wheat and barley is harvested in April-May. Various sources have put these immediate import needs at around 2 million to 3 million tons. As of mid-December, reports from trade sources and the Indian press indicated that India has already purchased about 350,000 metric tons of wheat and 100,000 of grain sorghum, mainly from the United States, Canada, Romania, and Argentina.

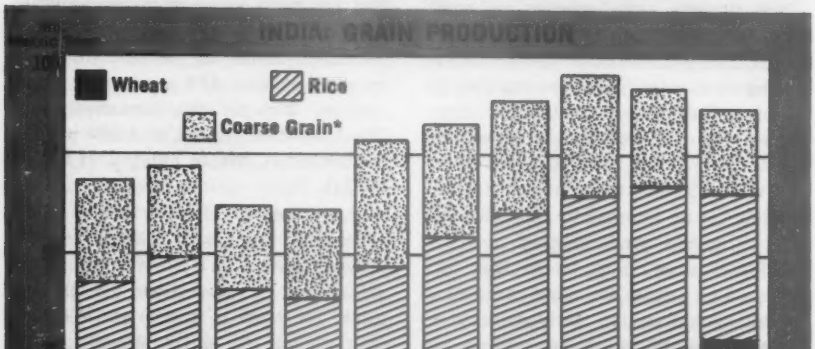
India harvests two grain crops. The spring-harvested crop (wheat and barley) usually accounts for about 30 percent of total production. The fall-harvested crop (including most of the rice, sorghum, millets, and corn) makes up the more important balance.

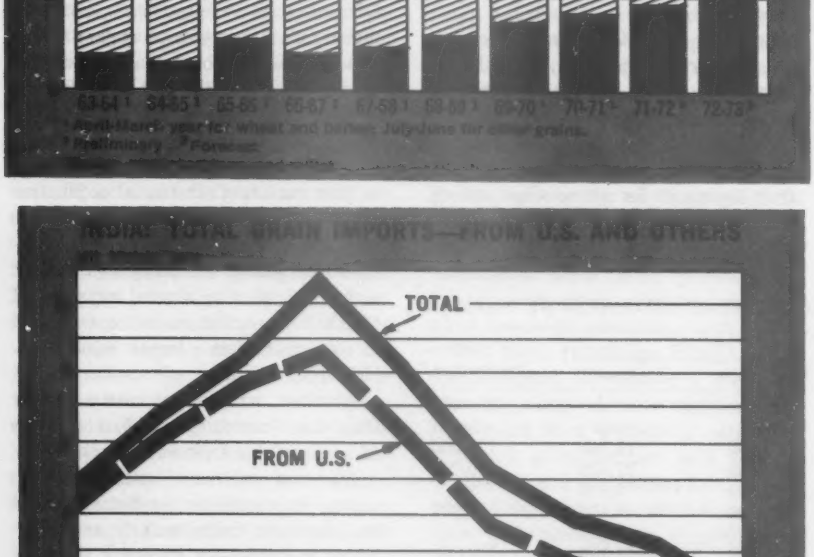
It was the fall crop that suffered from the drought, during both the seeding and growing periods. India's fall grain production this year is lower both in acreage and yield and is perhaps 10 million tons below last year's level. The 1972 spring crop, however, was not affected by the drought and actually set a record 3 million tons over the 1971 crop.

Indian officials hope the good spring performance will be repeated again in









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Indian officials hope the good spring performance will be repeated again in

1973, helping to alleviate the current grain shortage. There are reports of larger wheat seedings and some improvement in moisture conditions as a result of recent rains, but soil moisture apparently still is down in many areas. There are also indications of fertilizer shortages and inadequate energy to operate irrigation facilities. Thus, it appears doubtful that the country's 1973 spring crop will be large enough to meet requirements until next year's fall harvest.

Until this season, India had enjoyed 5 successive good monsoon years. Since droughts have occurred at similar intervals in the past, it was not unusual for one to come along in 1972. Drought affected 2 years' grain production in 1965 and 1966, causing an average import requirement of 9 million tons for 1965-66 and 1966-67. But with large increases in grain production in subsequent years, India's grain imports shrank quickly.

The bulk of the increase in Indian grain production was in wheat where new high-yielding varieties were planted on increased acreage, much of it irrigated. Yields of rice, by contrast, showed only a slight steady improvement, while coarse grain yields only fluctuated and appeared to be stagnant.

How much grain India will need to import in 1972-73 beyond the 2 million to 3 million tons currently strongly hinted at will be determined largely by the following factors:

- How far stocks can be drawn down to supplement the decreased production;
- How much consumption might reasonably be curtailed during a temporary period of reduced supply; and
- Emerging prospects for 1973 crops.

It is useful to examine the Indian grain situation in the light of per capita consumption data. As the table here shows, India's rising grain production since the troubled mid-sixties has not only enabled lower imports, but has also increased per capita consumption of grains despite sharp increases in the population.

Grain stocks at the start of 1972-73 were high in the absolute sense but on a per capita basis were not much above levels of the mid-sixties. Thus, if imports are held at 2 million to 3 million tons and stocks are drawn down to the lowest per capita level in the last 10 years—allowing 4.6 million more tons for consumption in 1972-73—per capita consumption would fall back to the average for the drought-affected years of 1965 through 1967. To maintain consumption at the level achieved in 1971-72, on the other hand, would probably require over 5 million tons of imports during 1972-73 plus about 5 million tons of stock drawdown.

To put things in perspective, grain consumption accounts for about two-thirds of India's caloric consumption.

Above, a grain market in old Delhi. Right, farm workers thresh rice by hand in Rajasthan.

INDIAN GRAIN SUPPLY AND DISTRIBUTION

Year	Population [1]	Beginning stocks	Production	Imports	Exports	Consumption		Ending stocks
						Total	Per capita	
	Million	*Million metric tons*	*Million metric tons*	*Million metric tons*	*Million metric tons*	*Million metric tons*	*Pound*	*Million metric tons*
1960-61	440.3	24.3	68.5	5.0	—	71.2	356.5	26.5
1961-62	450.3	26.6	69.5	3.3	—	73.4	359.3	26.0
1962-63	457.0	26.0	70.6	4.1	—	74.5	359.4	26.2
1963-64	464.0	26.2	71.9	4.7	—	74.7	354.9	28.1
1964-65	470.5	28.1	74.0	6.8	—	80.0	374.8	28.9
1965-66	482.5	28.9	64.2	8.5	—	73.7	336.7	27.9
1966-67	496.0	27.9	64.9	10.9	—	79.3	352.4	24.4
1967-68	508.0	24.4	76.7	8.1	([2])	81.0	351.5	28.2
1968-69	520.0	28.2	82.6	5.0	([2])	86.5	366.7	29.3
1969-70	532.0	29.3	86.0	3.8	([2])	90.1	373.4	29.0
1970-71	544.0	29.0	92.8	3.2	([2])	92.8	376.1	32.2
1971-72 (preliminary)	557.0	32.2	91.2	1.9	.2	93.1	368.5	32.0
1972-73 (forecast)	570.0	32.0	84.0	[3] (2.0)	[4] .8	89.8	347.3	[5] 27.4

[1] As of Janaury 1. [2] Less than 50,000 tons. [3] Assumed imports. [4] Already exported. [5] Assumed that stocks are drawn to lowest per capita figure in last 10 years.

Note: The figures in this table incorporate a supply and distribution of wheat and barley on an April-March year, with data on other grains on a July-June basis.

CONSUMER-READY ITEMS BOOST U.S. FARM SALES IN HONG KONG

CONSUMER-READY PRODUCTS are claiming a larger share of U.S. agricultural exports to Hong Kong as prosperity and tourism bring changes in the Colony's import needs. Contributing to this growth is the quality image associated with U.S. foods, as well as the extensive promotion of these items in the Hong Kong market.

Also important to expansion in sales of consumer-ready and other products in Hong Kong are the Colony's liberal trade policies. It is virtually a free port, with duties levied only for revenue purposes and on very few commodities.

The growth in U.S. sales of consumer-ready products—fresh and processed foods and other items for direct human consumption—has been especially pronounced since calendar 1968, a turning point for both these products and the traditionally important bulk exports like cotton, rice, wheat, and feedgrains.

In 1968, huge cotton exports had carried total U.S. agricultural sales to Hong Kong to an alltime high of $72.5 million. U.S. exports of consumer-ready products, on the other hand, had fallen from the previous year to a mere $14.9 million.

Cotton's rapid ascent, however, was followed by an even more precipitous fall, and its sales skidded from a 1968 high of $31.9 million to $11.7 million in 1969, to a low of $7.2 million in 1970. At the same time, exports of U.S. consumer products turned up. Rising at the rate of $5 million a year, these products by 1970 had captured 40 percent of U.S. agricultural exports to Hong Kong, contrasted with only 20 percent in 1968.

In 1971, a recovery in cotton reduced the market share for consumer-related products, but they still held $25 million, or 37 percent, of the $68.9 million in U.S. agricultural sales to Hong Kong. Moreover, their future is more assured than cotton's, since rising imports of cotton yarn from Pakistan appear likely to affect sales of U.S. raw cotton. With their strong potential for further gains, consumer-related products can help make up for any future drop in sales of cotton and other bulk items.

The largest contributors to trade expansion in consumer-related products have been fresh fruits—mainly oranges, grapes, and apples—total sales of which more than doubled between 1968 and 1971 to $12.4 million. Rapid growth also occurred between 1968 and 1971 in exports of U.S. poultry and red meats, up 40 percent to $5.6 million; dried fruit, up 63 percent to $935,000; and fruit and vegetable juices, up 28 percent to $721,000. Among grocery items, big gainers have been infant dietary supplements, up 53 percent to $1.16 million, and condensed soups, up by two-thirds to $712,000.

These increases reflect the continuing trend in Hong Kong toward Westernization of the diet—a trend that is fueled by the Colony's rapid economic and population growth rates, combined with a seemingly endless boom in the tourist industry.

Tourist numbers, alone, are forecast to rise from the 910,000 of 1971 to over a million in 1972 and to reach 2 million by 1980. They are expected to generate an average increase of 1,000 hotel rooms through 1976 and to account for a large share of future food imports from the United States.

Also encouraging for U.S. food sales is the beginning of supermarket shopping in Hong Kong. Four new supermettes opened in 1971, and an additional three to four opened this year, increasing the total number 50 percent.

In these and other retail outlets, U.S. products are already highly visible, according to a survey of major institutional outlets by the Far East Research Organization (FERO).

The survey found that although more than 30 countries supply foods to Hong Kong, products from the United States are far the most prominent in the retail stores. Products from the United Kingdom and Australia run a distant second and third.

Especially popular are U.S. canned fruits, vegetables, and juices; chicken parts; and baby foods—for which the United States seemed to be Hong Kong's sole source.

Australia and the United Kingdom were found, on the other hand, to equal or surpass the United States in selling such selected product lines as cereals, condiments, cheese, and powdered milk.

The 39 Western-type hotels and restaurants also surveyed reported results similar to those for institutional outlets. Imported frozen whole chickens were among the products used by nearly all these hotels and restaurants. They also buy canned fruits and meats, fresh fruits and vegetables, juices, frozen beef, condiments, and cheese.

However, very few of the hotels or restaurants in the sample bought U.S. powdered milk or prepared foods. U.S. beef was used by less than 30 percent.

The weakest outlets for U.S. products were the 50 Chinese restaurants surveyed. Most of these used U.S. condiments and fresh vegetables. About half also used U.S. fresh and canned fruits. But none had any U.S. beef or turkey, and few carried any of the other products on the survey list.

THE SURVEY pointed out the need to maintain and expand retail sales and distribution to all three types of institutional users—with emphasis on tapping more of the Chinese market. Items that could be used by the latter include turkeys, chicken and turkey parts, fully or partially processed poultry products, less expensive beef cuts, fresh fruits and vegetables, some of the convenience foods, and products produced in Hong Kong from U.S. raw materials.

U.S. attempts to enlarge these markets have inc'uded several U.S. food promotions in Hong Kong—the latest of which was held in May 1971 and attracted 83 U.S. firms.

One of the major breakthroughs of this exhibition was the entry of quality U.S. meats into the market for the first

time. At the conclusion of the event, four U.S. beef companies were represented, four agents were selling a wide variety of cured meats and sausages, and one firm was handling kosher meats. The agents have since established accounts in seven hotels, four restaurants, one private club, and in retail markets, including supermarkets.

On the agenda for the coming year are a number of additional promotions aimed at enlarging the market for consumer-ready products. These include:

- Point-of-purchase promotions in February and June 1973 at 25 to 30 superettes and other retail outlets, which account for 20 percent or more of retail sales of consumer-ready products.

Products to be promoted include poultry; beef; processed meat; sterilized milk products; milk-base infant and dietetic foods; dry whole milk; fresh fruits in season (oranges, lemons, grapefruit, apples, grapes, prunes and plums, and tropical fruits); canned and bottled cherries, peaches, and fruit cocktail; frozen berries; orange juice and other fruit concentrates; frozen vegetables; canned corn, pickles, beans, tomato puree, and asparagus; fresh vegetables in season (onions, celery, lettuce, radishes, tomatoes, etc.); catsup and chili sauce; canned tomato juice; baby foods; soups; mayonnaise and salad dressing; honey; pet foods; cake mixes; and nuts.

- A 2-day event of exhibits and demonstrations in February 1973 for institutional buyers and importers, followed by 3 days of trade contacts by seminar-exhibit panel members.

Products to be demonstrated are U.S. beef, pork, and poultry, including portion control, further processed, and heat-and-serve items: institutional-size packs of canned peaches and fruit cocktail; salad dressing; catsup; pickles; potato flakes and french fries; and fresh grapes, oranges, apples, and lettuce.

- An American Fortnight during October 15-28, 1973, sponsored by the U.S. Chamber of Commerce in Hong Kong with assistance from the U.S. Departments of Agriculture and Commerce. Activities will center around the promotion of consumer products, both foods and nonfoods, and will include point-of-purchase and menu promotions in retail food outlets. Several Hong Kong department stores and over 25 agents of U.S. manufacturers have expressed interest in participating.

Aside from the chopsticks, this Hong Kong family's dinner is American-style, including fried chicken.

Hong Kong street markets, like one above, stock U.S. food products. Shoppers, left, examine U.S. consumer-ready foods at a joint FAS-U.S. food industry exhibition in the Colony.

New Brazilian Sugar Terminal Speeds Shipments

BRAZILIAN EXPORTS of sugar to the United States and other foreign markets are getting a boost from a new sugar terminal—the first for Brazil—in the northeastern port of Recife.

Inaugurated in September 1972, the terminal will help satisfy the increasing need for bulk sugar from the northeast of Brazil, especially in the States of Alagoas and Pernambuco, for export to world markets. These foreign markets have been shifting to sugar in bulk, as opposed to the traditional bagged form, since World War II, thus making it necessary for producing countries to construct bulk-handling facilities.

Brazil is the world's third largest sugar exporter, exceeded only by Cuba and Australia. Its shipments have averaged around 1 million metric tons in recent years, but they jumped to some 2 million in 1972 and will rise still further in coming years.

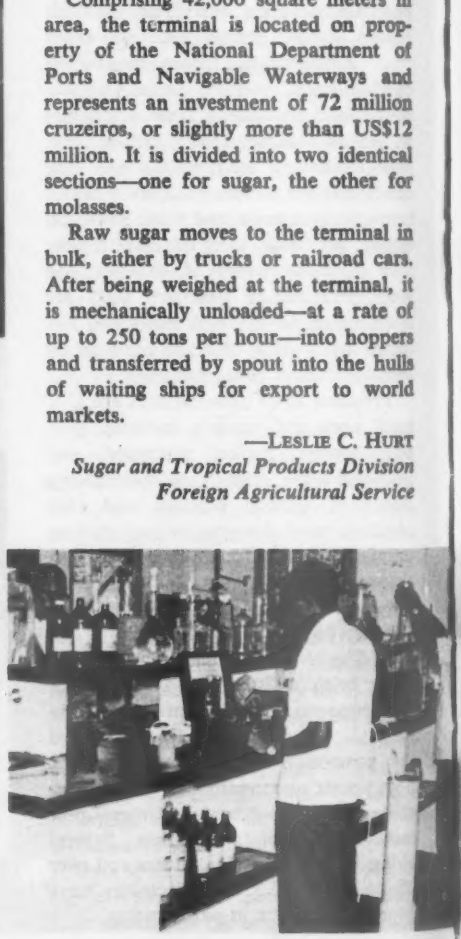
A large part of the exports—generally about half—end up in the United States. And, because of a Brazilian law requiring all exports to the United States to originate in the northeast, Recife is the major port through which they move. Additional important markets are Japan and other South American countries.

The new terminal will expedite such trade with its 200,000-ton storage capacity and its mechanical loading system, which can handle 1,000 tons an hour on a 24-hour-a-day basis. These and other modern features of the terminal are expected to lower costs, increase product outturn, and reduce the time ships must remain in port.

Comprising 42,000 square meters in area, the terminal is located on property of the National Department of Ports and Navigable Waterways and represents an investment of 72 million cruzeiros, or slightly more than US$12 million. It is divided into two identical sections—one for sugar, the other for molasses.

Raw sugar moves to the terminal in bulk, either by trucks or railroad cars. After being weighed at the terminal, it is mechanically unloaded—at a rate of up to 250 tons per hour—into hoppers and transferred by spout into the hulls of waiting ships for export to world markets.

—LESLIE C. HURT
Sugar and Tropical Products Division
Foreign Agricultural Service



Counterclockwise from top: Aerial and closeup views of terminal facilities; control panel, which automatically scans receiving and unloading of sugar; and laboratory, where samples of products can be immediately analyzed.

Greece Sets Labeling Code For Imported Food Items

Greece has established a labeling requirement for consumer-packed food and beverage items that will affect imports from the United States totaling some $2 million. Basically the Greek regulation will require these items to be labeled in Greek according to specific standards.

A preliminary survey indicates that imports from the United States to be affected by the new regulation, and their approximate values in thousands of dollars, are: Baby food, 800; cake mixes and similar products, 300; squid, 350; canned fruits and vegetables, 300; cereals, 150; powdered milk, 100.

To date there have been few complaints about the new Greek requirements. USDA has been advised that the Greek regulations are largely based on the U.S. labeling code and that most U.S. suppliers of these products have already made, or are now making plans, to comply.

GRAINS, FEEDS, PULSES, AND SEEDS

Dry Beans Now Eligible For CCC Export Credit

Effective December 1, dry beans became eligible for export under the Commodity Credit Corporation's Export Credit Sales Program. The credit period for this commodity will be limited to a maximum of 12 months. This action, recommended by the bean industry, is expected to help increase U.S. exports of the large 1972 dry bean crop.

Grain Exports and Transportation Trends: Week Ending December 8

Weekly export inspections of wheat, feedgrains, and soybeans totaled 1.96 million metric tons for the week ending December 8—a 9-percent rise from the week before, and 26 percent above the November weekly average. This is the highest weekly total yet attained in fiscal 1973.

Inland transportation continued at a high level during the week. Railcar loadings of grain totaled 33,723 cars (up slightly from the week before), the highest weekly total in FY 1973. Barge shipments of grain, at 639,000 metric tons, were down by 14 percent.

GRAIN EXPORT AND TRANSPORTATION TRENDS: WEEK ENDING DECEMBER 8

Item	Week ending Dec. 8	Previous week	Weekly average, November	Weekly average, first quarter
	1,000 metric tons	*1,000 metric tons*	*1,000 metric tons*	*1,000 metric tons*
Weekly inspections for export:				
Wheat	773	650	542	414
Feedgrains	743	731	612	626
Soybeans	441	414	399	133
Total	1,957	1,795	1,553	1,173
Inland transportation:				
Barge shipments of grain	639	741	590	515
	Number	*Number*	*Number*	*Number*
Railcar loadings of grain	33,723	33,235	30,060	28,556

Rotterdam Grain Prices and Levies

Current offer prices for imported grain at Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	Dec. 20	Change from previous week	A year ago
	Dol. per bu.	*Cents per bu.*	*Dol. per bu.*
Wheat:			
Canadian No. 1 CWRS-14	3.23	+9	2.01
USSR SKS-14	(1)	(2)	1.89
Australian FAQ[3]	2.98	+5	1.66
U.S. No. 2 Dark Northern Spring:			
14 percent	2.98	+7	1.92
15 percent	2.99	+6	1.94
U.S. No. 2 Hard Winter:			
13.5 percent	2.98	+4	1.80
No. 3 Hard Amber Durum	2.94	+6	1.83
Argentine	(1)	(2)	1.84
U.S. No. 2 Soft Red Winter	(1)	(2)	1.74
Feedgrains:			
U.S. No. 3 Yellow corn	2.07	+7	1.45
Argentine Plate corn	2.40	+6	1.59
U.S. No. 2 sorghum	2.19	+11	1.54
Argentine-Granifero sorghum	2.20	+12	1.56
U.S. No. 3 Feed barley	1.84	−2	1.30
Soybeans:			
U.S. No. 2 Yellow	4.91	+17	3.42
EC import levies:			
Wheat[5]	[4].86	−11	1.59
Corn[5]	[4].72	−6	1.08
Sorghum[5]	[4].57	−8	.97

[1] Not quoted. [2] Basis c.i.f. Tilbury, England. [3] Durum has a separate levy. [4] Effective October 14, 1971, validity of licenses with levies fixed in advance is a maximum of 30 days. [5] Italian levies are 21 cents a bu. lower than those of other EC countries. Note: Basis 30- to 60-day delivery.

Japan Buys U.S. Wheat

Japan purchased 312,068 metric tons of U.S. wheat on a December 6 tender, including 60,500 tons Dark Northern Spring, 138,568 tons Hard Red Winter, 96,000 tons Western White, 14,000 tons Soft Red Winter, and 3,000 tons Hard Amber Durum. Food Agency wheat purchases for shipment during the July 1972-June 1973 period total 3,625,938 metric tons of which the U.S. share is 2,095,093 tons, or 57.8 percent. For the comparable 1971-72 season, cumulative purchases were 3,255,128 metric tons.

Australia Establishes Higher Wheat Prices

The Australian Wheat Board has set wheat prices for the December 1972-November 1973 marketing year about 3 percent above those of the previous season.

The export-price guarantee, applicable to the first 200-million bushels of current crop that are exported, was raised from US$1.81 to $1.87 per bushel (f.a.q., f.o.b. ports).

The price of wheat for domestic human consumption was raised from $2.12 to $2.19, that for industrial use and stock feed from $1.77 to $1.845.

EC Intervention Stocks Of Wheat, Barley, and Rye

As of November 7, 1972, European Community wheat, barley, and rye intervention stocks were 1.8 million, 400,000, and 430,000 tons, respectively. The bulk of this grain is in West Germany where stocks are 1.3 million tons of wheat, 460,000 tons of barley, and 360,000 tons of rye.

At this time last year, German intervention stocks were 1.2 million tons for all grains compared with 2.1 million this year. German intervention stocks have not reached these levels since 1969.

SUGAR AND TROPICAL PRODUCTS

India's Jute Crop Down 19 Percent; Imports Needed

India will have to import at least 180,000 metric tons of jute and kenaf during 1972-73 in order to maintain mill production, more than half of which is exported. Imports will also stabilize raw fiber prices. India has been reducing its fiber import requirements and was self-sufficient in 3 of the last 5 crop years. However, the current fiber crop is estimated at 19 percent below a year earlier, the result of adverse weather. Arrangements were recently concluded to obtain 36,000 tons from Bangladesh.

Record Pepper Crop Forecast for India

Reflecting favorable growing conditions, the 1972-73 (Nov.-Oct.) Indian pepper crop is expected to reach a record 37,000 metric tons, up nearly 9 percent over the large 1971-72 harvest of 34,000 tons.

India's pepper exports in 1972 are expected to total between 20,000 and 21,000 tons, compared with 1971 shipments of 16,901 tons. Because of the large 1972-73 crop, exports should increase to around 23,000 tons in 1973. However, Indian pepper shipments to the United States still remain at low levels, as U.S. importers prefer to trade in the lower priced Indonesian pepper.

U.S. imports of black and white pepper during the first 9 months of 1972 have totaled 35.7 million pounds valued at $14.6 million, off from the unusually large imports of 52.3 million pounds valued at $23.2 million during the corresponding 1971 period. Imports of Indian pepper during the 9-month 1972 period totaled only 1.9 million pounds, compared with imports of 23.1 million pounds from Indonesia.

Britain To Expand 1973 Sugar Output

The British Sugar Corporation has announced that it plans to accept sugarbeets from an additional 25,000 acres in 1973. This will bring the contract acreage up by 5.5 percent to 469,000 acres. Processing capacity is said to be adequate to deal with beets from the expanded acreage and further increases.

The U.K. Government has made a pledge that the guaranteed price for sugar will apply in 1973 to the normal area of 443,000 acres. Any sugar produced over and above that from this acreage will earn a price dependent upon the price of sugar on world markets. Contracts are being adjusted in line with Common Market regulations involving changes in the beet price structure and the introduction of transport and pulp allowances, as the EC entry becomes effective for the United Kingdom on February 1, 1973.

Tanzanian Sisal Production Down

Sisal production in Tanzania, the world's largest exporter, has been afflicted by prolonged drought. Production in 1972 is estimated by trade sources in the range of 168,000 metric tons, 17 percent less than in 1970 and down 7 percent from last year.

TOBACCO

Consumer Demand Boosts Yugoslav Output of Blend Tobaccos

Yugoslavia produced an estimated 65,928 metric tons of tobacco leaf in 1972, according to the Tobacco Institute of Serbia in Belgrade—a jump of about 38 percent. The increase was partly attributable to a 14-percent increase in harvested acreage compared with the previous year, but most of the credit must go to abundant rainfall during the growing season which resulted in a higher average yield. Particularly notable was the jump in production of tobaccos for blending.

Of total production, oriental and semioriental tobaccos accounted for 45,494 metric tons, about 6,000 tons more than in the preceding year, but acreage remained about the same. Flue-cured Virginia leaf totaled 8,627 metric tons, and air-cured burley and domestic burley-type varieties accounted for 11,667 metric tons. Taken together, these tobacco types (excluding oriental tobacco) accounted for 30.1 percent of total tobacco production this year.

By contrast, production of some Vojvodina dark tobaccos have been reduced to an insignificant volume in favor of other, better quality tobacco types.

The changes in production patterns have resulted from growing consumer demand for filter tipped, American-type cigarettes of blended tobaccos. Because of this recent development, further expansion in production of Virginia and burley tobaccos is expected.

New Greek Law Could Up Tobacco Imports From United States

The Greek Parliamentary Council may recommend for legislative action a law that would encourage the manufacture of "foreign blend" cigarettes and permit use of imported tobacco in their manufacture. This modification of present regulations could result in larger imports of U.S. burley and Virginia tobaccos.

Greek cigarette manufacturers have tried to build an overseas market for Greek-type cigarettes, but with little success. They believe that active promotion of foreign blend cigarettes would create a market and increase the country's supply of foreign exchange.

Greek farmers produce both burley and flue-cured tobaccos similar to U.S. Virginia tobacco, but the former is of low quality, while flue-cured leaf is only being grown on an experimental basis, is of poor quality, and is expensive.

COTTON

Russia Harvesting Large Cotton Crop

Press reports indicate that two Soviet Republics have produced bumper cotton crops and that total USSR output may surpass last year's record.

By late November it appeared that the Uzbek SSR, which produces two-thirds of all USSR cotton, and the Azerbaidzhan SSR, which ranks fourth among cotton-producing Republics, had each established cotton production records.

It now appears that total USSR cotton production will be at least as large as, and probably larger than, last season's record production of 7.1 million tons of unginned cotton.

Israel's 1972 Cotton Crop Surpasses 1969 Record

Israel's 1972-73 (August-July) cotton crop is expected to be around 185,000 bales (480 lb. net), only slightly exceeding the 1969 record of 184,000 bales despite a much larger use of nonirrigated land.

Israel's cotton imports totaled nearly 6,000 bales in 1971-72, most of which came from the United Kingdom. Imports from the United States declined from 2,100 bales in 1970-71 to 1,600 bales in 1971-72. Some cotton was also purchased from Turkey during the last 2 months of the marketing year.

Italy, Belgium, West Germany, and the United Kingdom remained Israel's most significant export markets in 1971-72, taking most of Israel's shipments of 65,000 bales.

Preliminary estimates for the 1972-73 marketing year indicate that imports of cotton will drop slightly from the 1971-72 level, while exports will rise.

FATS, OILS, AND OILSEEDS

Chinese Shortfall Boosts U.S. Soybeans in Japan

A shortfall in soybean deliveries from the People's Republic of China has caused a sudden, sharp increase in demand for U.S. Midwest soybeans for food use in Japan.

Reports from Japan indicate that adverse weather experienced by Mainland China earlier this year caused the delay of soybean shipments, and that the delivered soybeans are of considerably lower quality this year.

LIVESTOCK AND MEAT PRODUCTS

Australian Board Commissions Study of Meat Export Practices

In anticipation that Australian meat exports may double in the next 5 years to about 1.2 million or 1.3 million long tons, the Australian Meat Board has commissioned a special study into all aspects of shipping meat from Australia to overseas destinations.

The investigation will try to determine whether present cold storage, transport, and shipping arrangements will be able to cope efficiently with the expected increase in exports, or whether changes are necessary.

Among the aspects of the meat trade that will be scrutinized are the best methods of temperature control; how to reduce costs of moving meat from packers' cold stores to and into vessels; and how to improve shipping arrangements to ship meat to foreign purchasers most efficiently and at the lowest cost. Also to be studied is the possibility of using air transport for high-value meat, such as chilled cuts of beef or lamb. Bulk air transport of meat will also be scrutinized.

New Zealand Beef Plants Okayed

Germany has reportedly approved five New Zealand plants for export of beef. A German veterinarian will supervise the inspection in New Zealand.

FRUITS, NUTS, AND VEGETABLES

Smaller Australian Canned Pineapple Pack

Australia reports a smaller 1972 canned pineapple pack. Production is estimated at 1,475,000 cases, basis 24/2½'s, 10 percent below the 1971 pack of 1,639,000 cases.

The summer pineapple crop was excellent, but the intermediate crop was relatively poor because wet weather induced root rot. Weather conditions turned too dry during the winter crop causing losses of plants previously weakened by root rot.

Pineapple juice production is estimated at 900,000 cases, 7 percent above the 1971 pack of 841,000 cases, but below the 1969 and 1970 levels.

Smaller supplies of papaya have reduced tropical fruit salad production to 250,000 cases, sharply below the 1971 pack of 440,000 cases.

Australia forecasts smaller 1972 exports of canned pineapple and tropical fruit salad, while exports of pineapple juice are expected to approximate last year's. Exports totaled 259,000 cases, 57,000 cases and 48,000 cases, respectively, for these fruits in 1971.

Canada, New Zealand, and the United Kingdom are the major markets for canned pineapple. The United Kingdom was the largest pineapple juice outlet while Canada and the United States were the largest markets for tropical fruit salad.

Argentine Fruit Production and Exports Reduced by Frost Damage

In early October severe frosts and occasional hailstorms seriously damaged deciduous fruits in the Río Negro Valley of Río Negro and Neuquén Provinces, and those in the Provinces of Mendoza and San Juan.

All sources agree that the damage was extensive and severe and that pears suffered the worst damage, being in a more developed stage. Estimates are that apple production in 1972-73 will be down 40-60 percent, while pear production will probably be down even more. The quality of the fruit harvested will be poor because of aftermath effects of both frosts and hail.

Sharply reduced production together with poor quality is expected to drastically reduce the volume of apples and pears available for export in 1973.

Damage to grapes was less severe because they were in the early stage of development when the frost occurred.

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FOREIGN AGRICULTURE

British Grain Output Expected To Expand (Continued from page 4)

acres, or approximately 85 percent of total feedgrain area, compared with only 4.2 million acres, or 70 percent of feedgrain area, in 1960-64. This expansion in barley output has been related largely to the increase in livestock numbers, particularly hogs. (The United Kingdom also enjoys an export demand for malting varieties of barley.)

Wheat output has also risen dramatically in the past decade. Production has been climbing since 1960 and may reach a record 4.9 million tons in 1972, compared with 3.3 million in 1960-64. Area sown to wheat grew to around 2.8 million acres in 1971, up from a 1960-64 average of 2.1 million. It is estimated that wheat and flour production in recent years amounted to about 55 percent of total consumption, compared with an average of 40 percent in 1960-61 through 1962-63.

Once an important crop in the United Kingdom, oats has largely been displaced by barley. The decline is a response to reduced feed and food demand.

Much of the overall increase in U.K. grain output reflects higher yields arising from improved plant breeding, use of better seed varieties, effectively applied mechanization, higher fertilizer application, and other improvements. Yields, of course, continue to be strongly affected by weather, as well as by other factors like crop diseases.

Weather's dominating influence was borne out in 1971, when extremely favorable weather contributed to high yields and a record wheat crop. The total 1972 grain crop is estimated to at least match the high 1971 output of 15 million tons, despite an outbreak of yellow rust earlier this year.

Spain Reduces Import Duty on Cotton

Spain has reduced its ad valorem import duty on raw cotton from 18 to 13 percent, effective November 16 to an unspecified date. The benefits of lower priced imports should go primarily to merchants and spinners who produce for internal consumption (cotton manufactured for reexport can be imported on a drawback basis). A similar import duty reduction was in force from August 1971 through May 1972.

Cotton imports by Spain were up 50 percent in 1971-72, amounting to 470,000 bales (480 lb. net) as opposed to 313,500 bales in 1970-71 (August-July). The major suppliers of cotton to Spain are Turkey, Greece, and Brazil. Imports from the United States totaled 43,800 bales last season, up 150 percent from the previous season's imports of 17,800 bales.

The Spanish Government has frequently resorted to tariff reductions in recent years while setting global quotas to balance Spain's declining harvests. Poor weather and declining profitability have combined to discourage production.

Estimates for the 1972-73 crop are again lower than those of 1971-72, at 170,000 bales down from 180,000, following a down trend begun in 1969.